Oregon E-Government Program Benchmark Survey

Presentation to Oregon E-Government Portal Advisory Board

October 2019

dhm
RESEARCH

Research purpose

- Gauge residents' use of and attitude toward the online delivery of government services in Oregon.

- Track Oregonians' attitudes, uses, and experiences about how online services have changed over time.

- Assess Oregonians' expectations about data security.

Methodology

- Hybrid phone and online survey conducted October 10–16, 2019
- N=1,202 Oregon residents
  - Stratified sample: Willamette Valley and Rest of state N=400, Tri-county N=402
  - Online: N=575, Telephone: N=627
- Quotas by age, gender, and geographic area; weighted by area of the state
- Margin of error: N=1,202 ±2.8%; N=400 ±4.9%
- Results benchmarked against 2017, 2015, and 2013 surveys
- Due to rounding, some totals may differ by ±1 from the sum of separate responses.
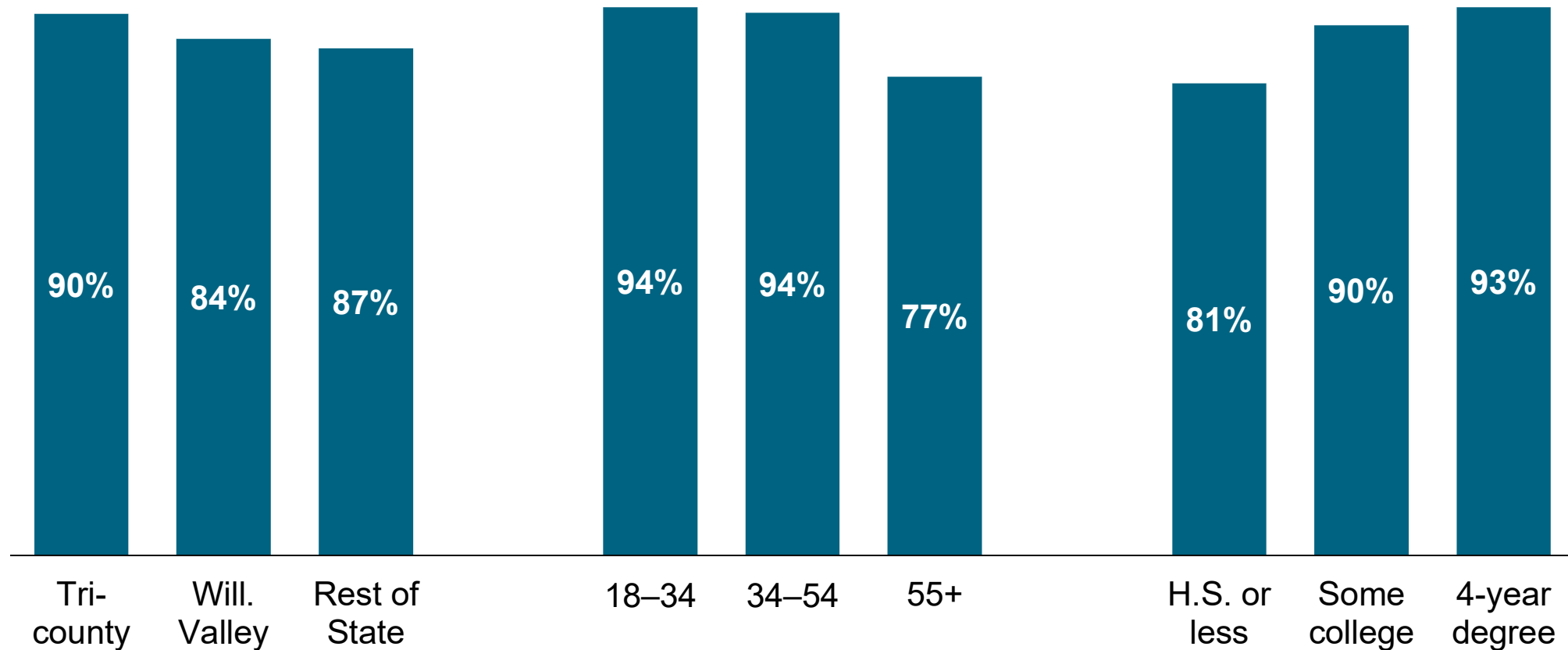
Internet access and communications

Most telephone respondents have internet access, though fewer than in previous years.
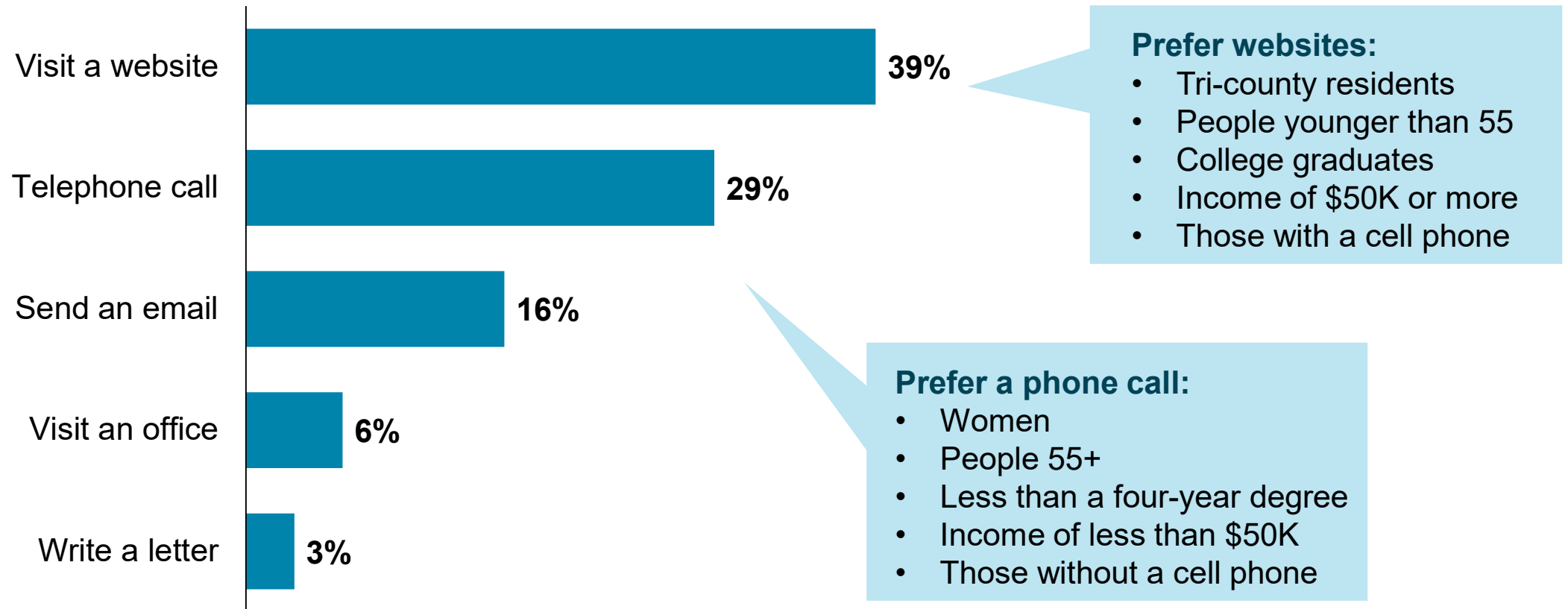
Total Internet Access

94% 96% 97% **92%**

2013   2015   2017   2019

7% **No internet access**

4% **Access outside home**

88%
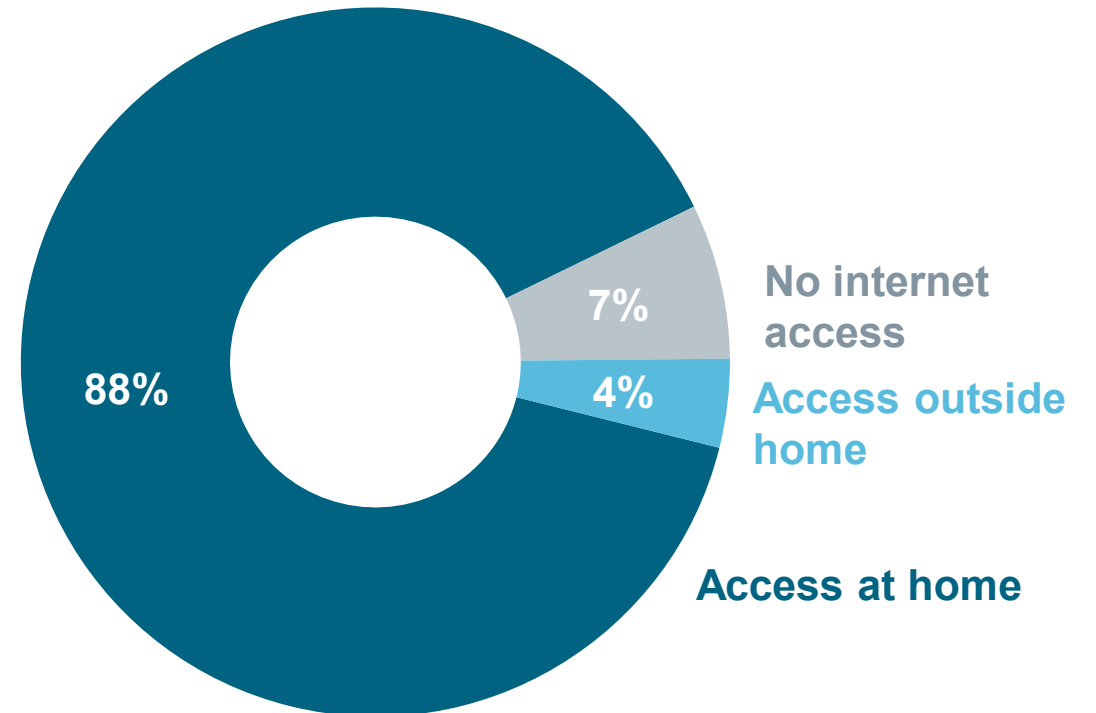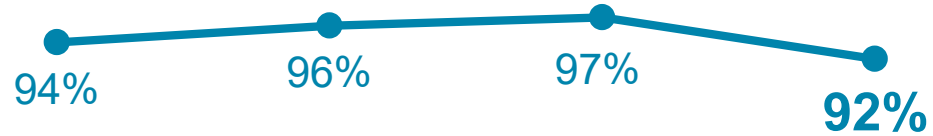
Access at home

2019

Access at home is lower among people in rural areas, older people, and those with lower education levels.

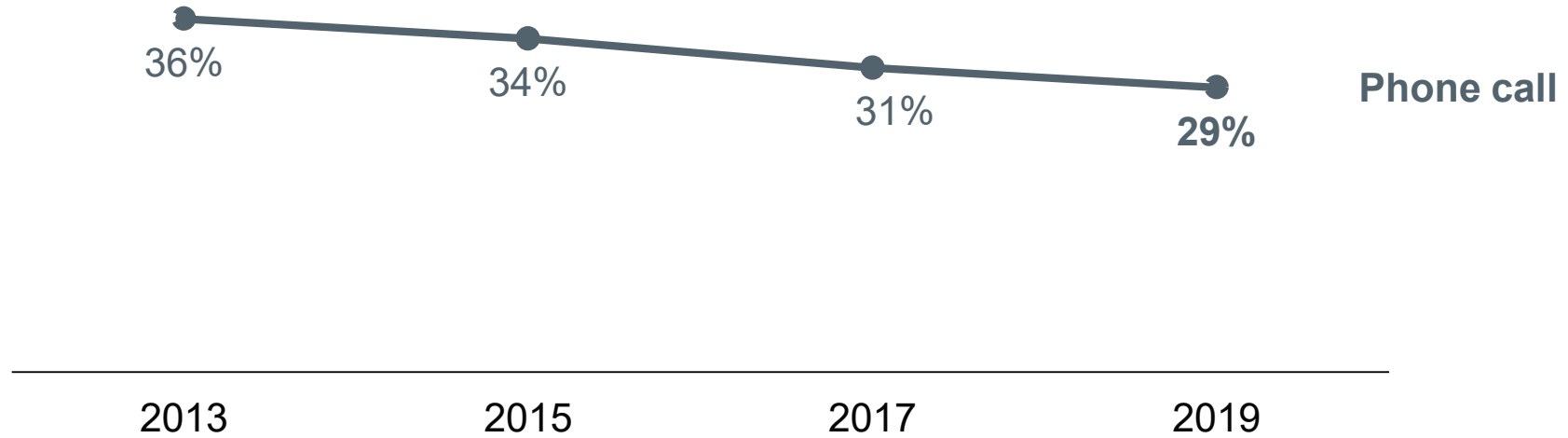| Tri-county	Will. Valley	Rest of State	18–34	34–54	55+	H.S. or less	Some college	4-year degree
90%	84%	87%	94%	94%	77%	81%	90%	93%

Oregonians prefer to contact their state government via a website, phone, or by email.

Method	Percentage
Visit a website	39%
Telephone call	29%
Send an email	16%
Visit an office	6%
Write a letter	3%

Prefer websites:
- Tri-county residents
- People younger than 55
- College graduates
- Income of $50K or more
- Those with a cell phone

Prefer a phone call:
- Women
- People 55+
- Less than a four-year degree
- Income of less than $50K
- Those without a cell phone

Preference for the website has spiked from 2017, while email has decreased.

Total website + email

55%

50%

48%

43%

Website

39%

35%

29%

26%

22%

Email

15%

14%

16%

2013   2015   2017   2019
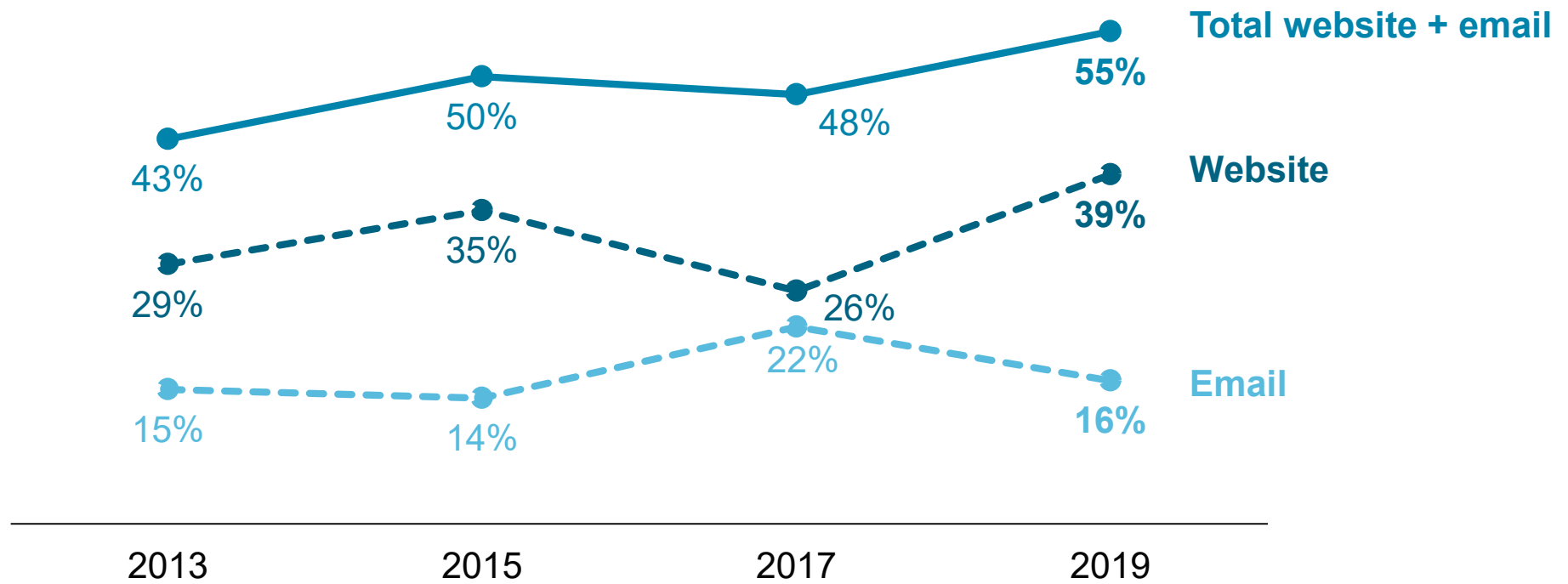
Preference for phone calls has decreased consistently since 2013.

36%

34%

31%

29%

**Phone call**

2013   2015   2017   2019

Online vs. traditional services

Convenience is the top advantage of online government services over traditional services.

Better than traditional   **The same**   **Worse**

	Better than traditional	The same	Worse
Convenience	78%	14%	6%
Speed	67%	21%	7%
Usefulness	67%	23%	7%
Cost	49%	34%	8%
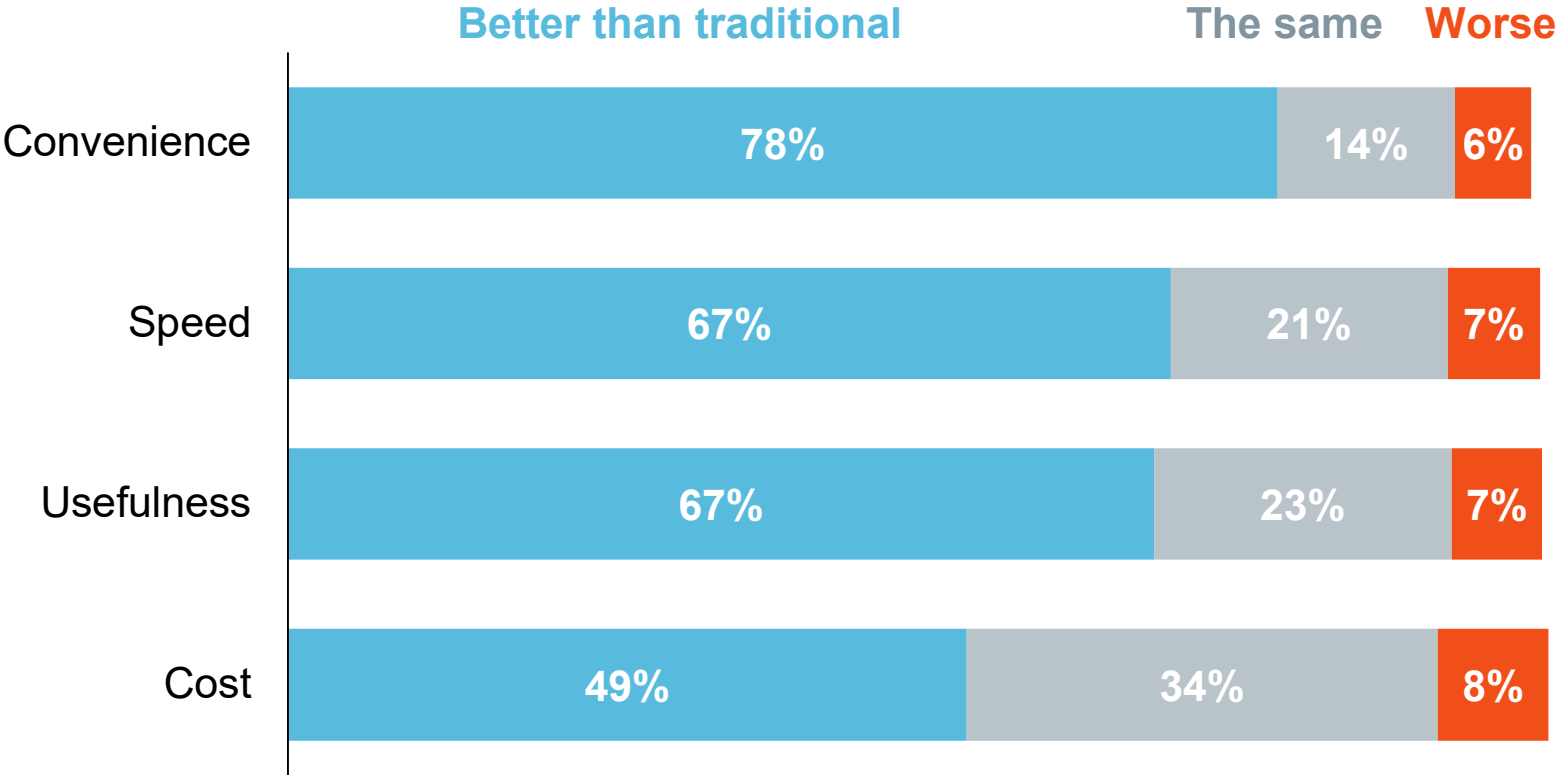
A growing number of Oregonians feel that online services are more convenient and faster.

Online Viewed as Better Than Traditional

Convenience

Speed

69%

62%

72%

78%

55%

54%

64%

67%

2013   2015   2017   2019
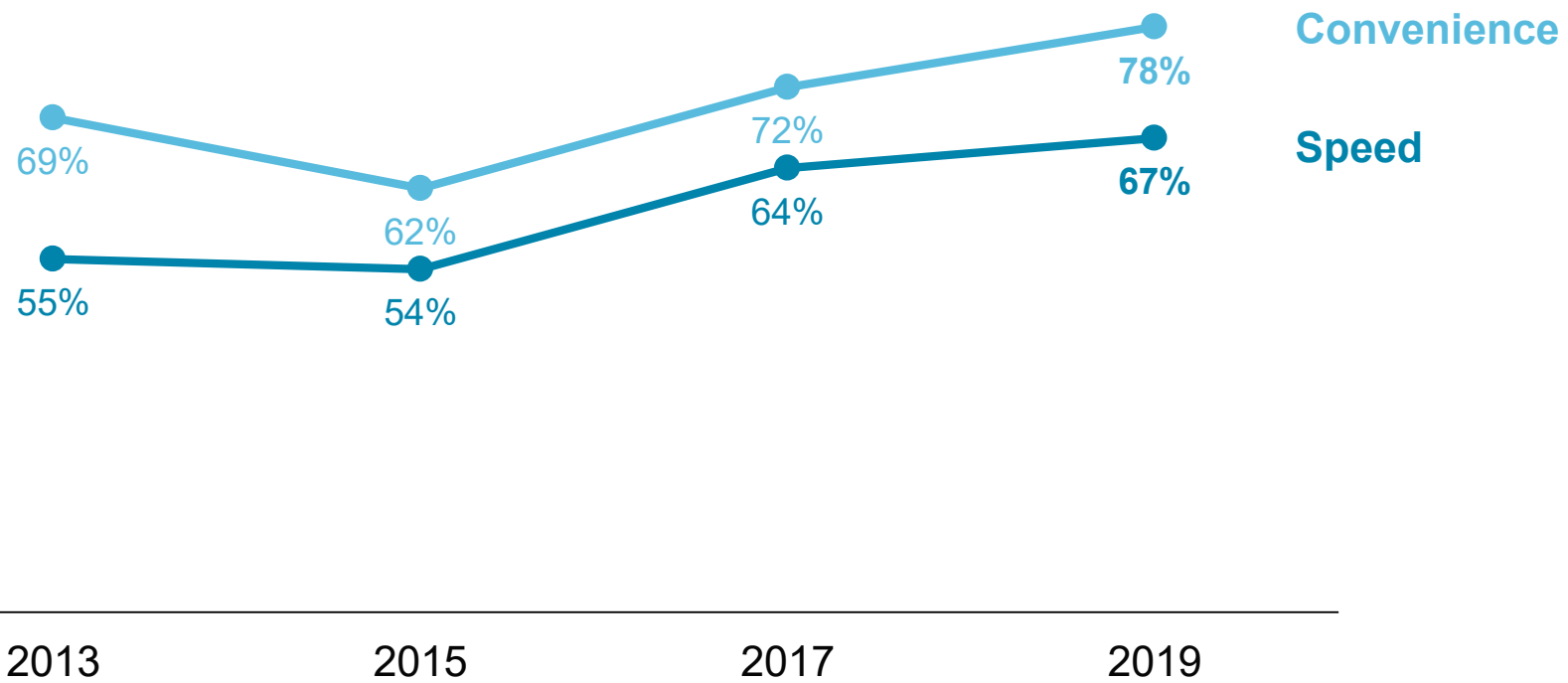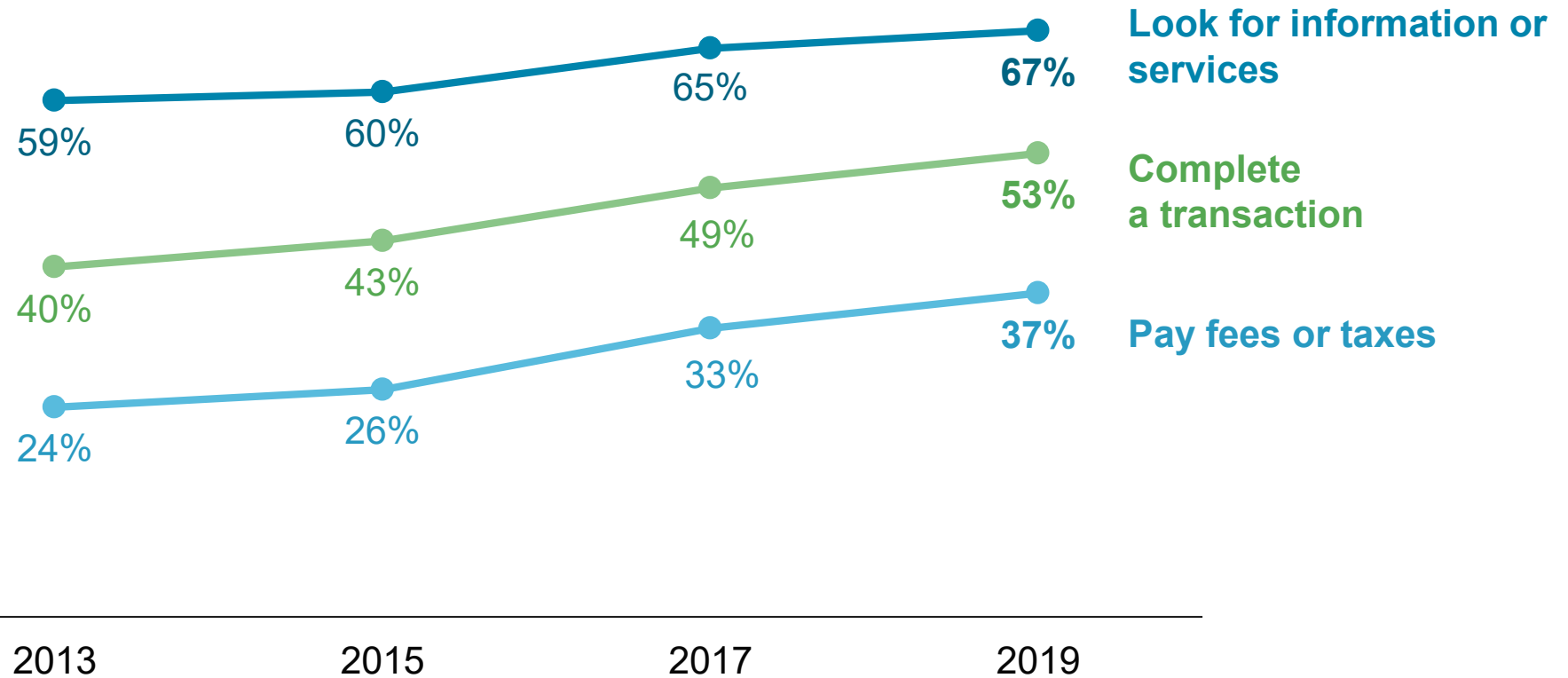
Use of government websites

Consistent with 2017, the most common reasons to visit a state site are looking for information, completing a transaction, and paying fees or taxes.

*Have you visited a State of Oregon agency website to:*

Look for information, data, or services	67%
Complete transaction such as reserving campsite or renewing car registration	53%
Pay fees or taxes	37%
Access health insurance information	29%
Access unemployment, welfare	28%
Apply for a job with the State	20%
Receive small business assistance	14%
Participate in a virtual public meeting	10%
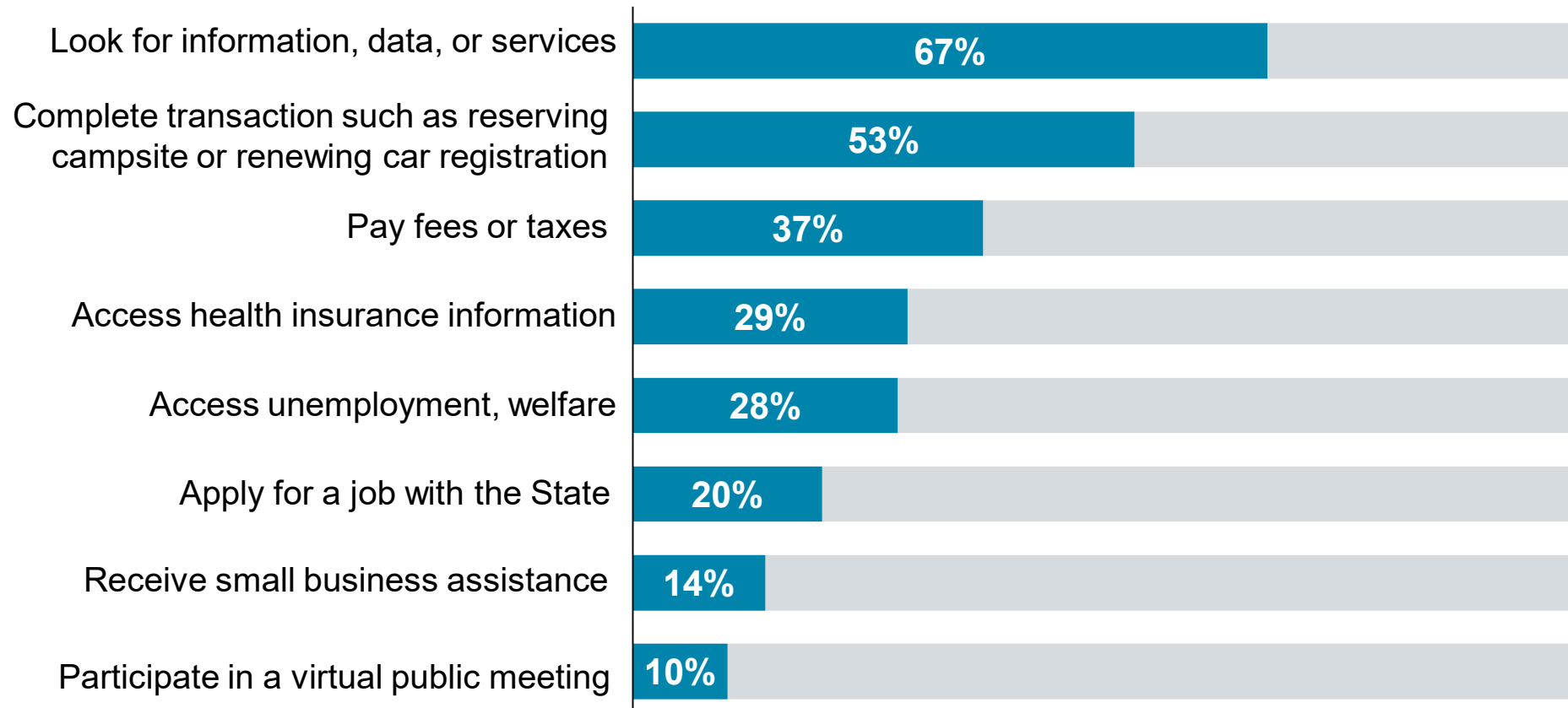
The number of Oregonians accessing state sites for the three most common purposes continues to rise.

Look for information or services

59% — 60% — 65% — **67%**

Complete a transaction

40% — 43% — 49% — **53%**

Pay fees or taxes

24% — 26% — 33% — **37%**
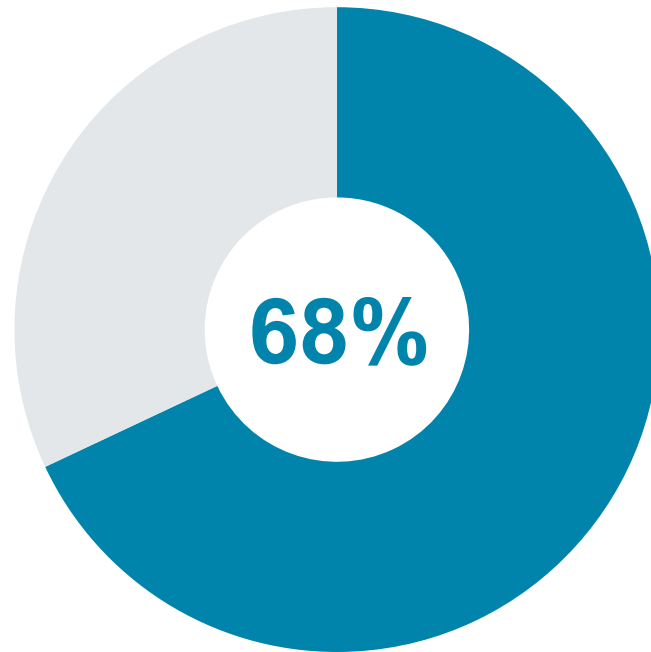
2013   2015   2017   2019

Oregon.gov

Oregon.gov has a wide reach; almost nine in ten have heard of it, and a majority have visited.

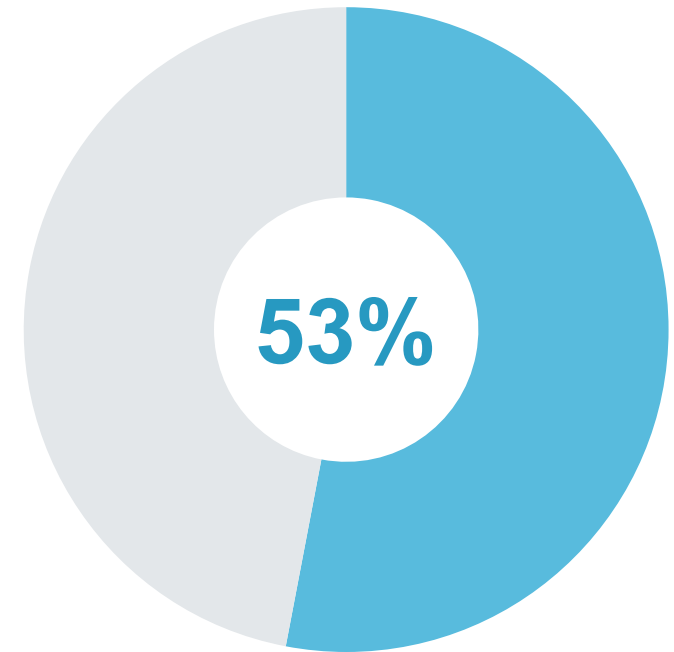**Heard of Oregon.gov**
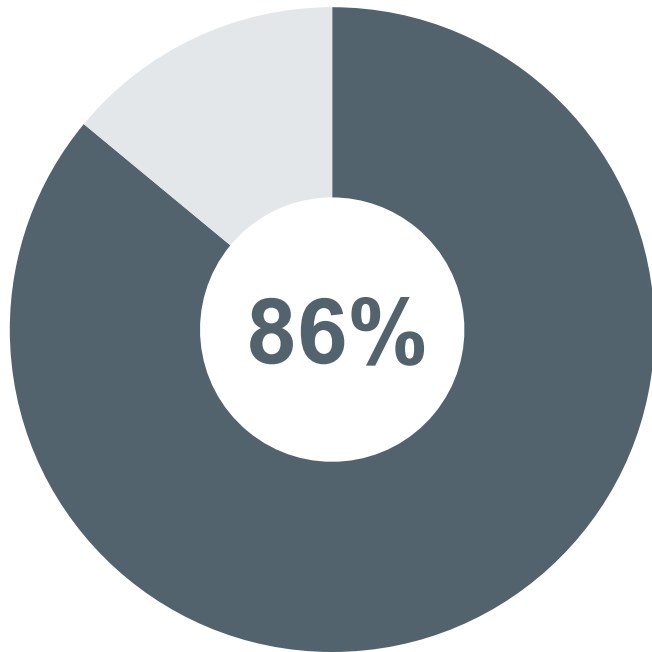
Visited Oregon.gov
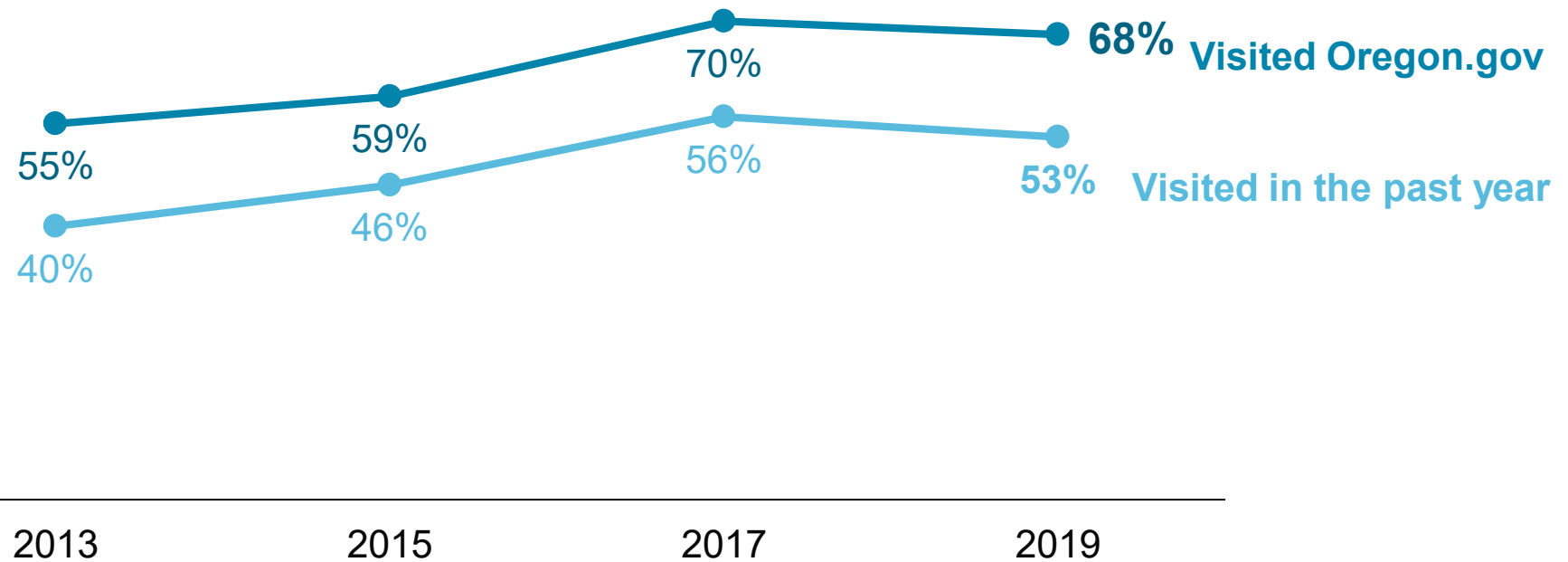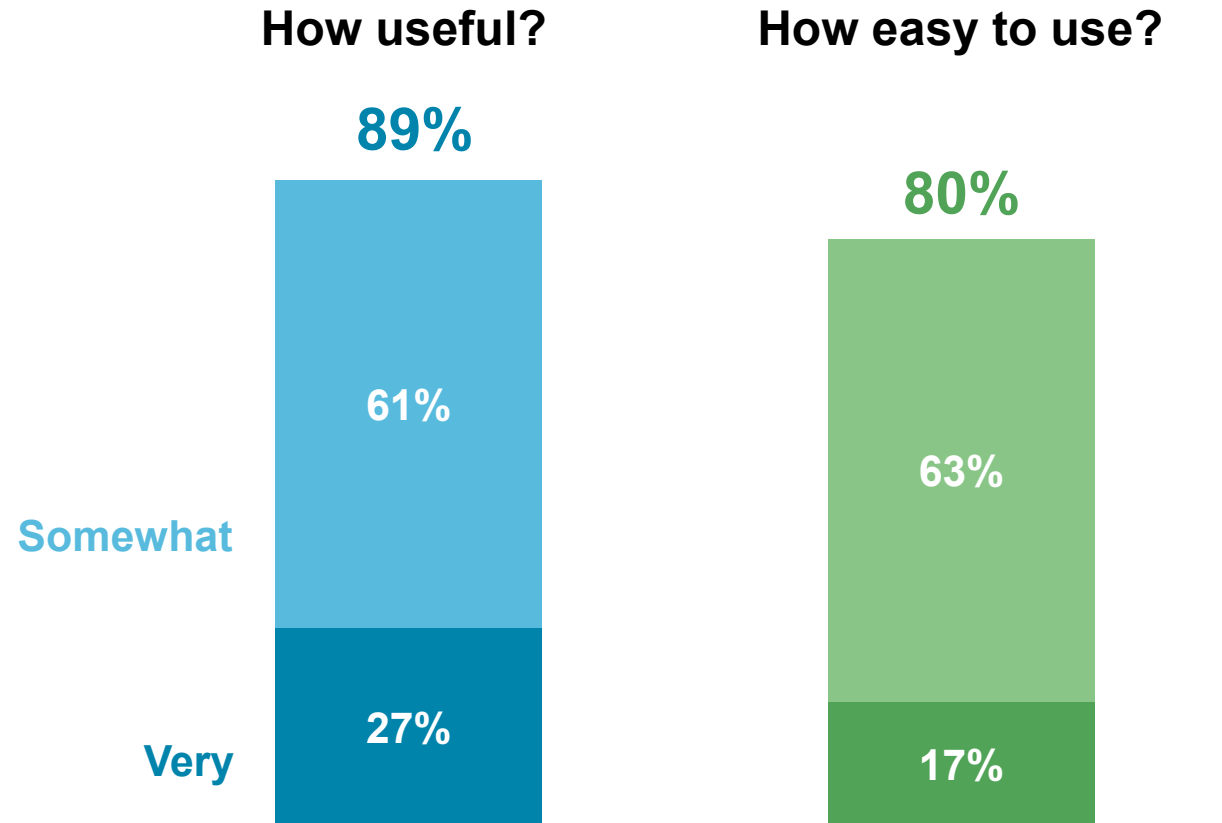
Visited in the past year

86%

68%

53%

After a spike in 2017, usage has leveled off.

68% **Visited Oregon.gov**

70%

59%

55%

56%

53% **Visited in the past year**

46%

40%

2013   2015   2017   2019

Strong majorities of those who have been to Oregon.gov say it is both useful and easy to use.

How useful?

89%

61%

Somewhat

27%

Very

How easy to use?

80%

63%

17%

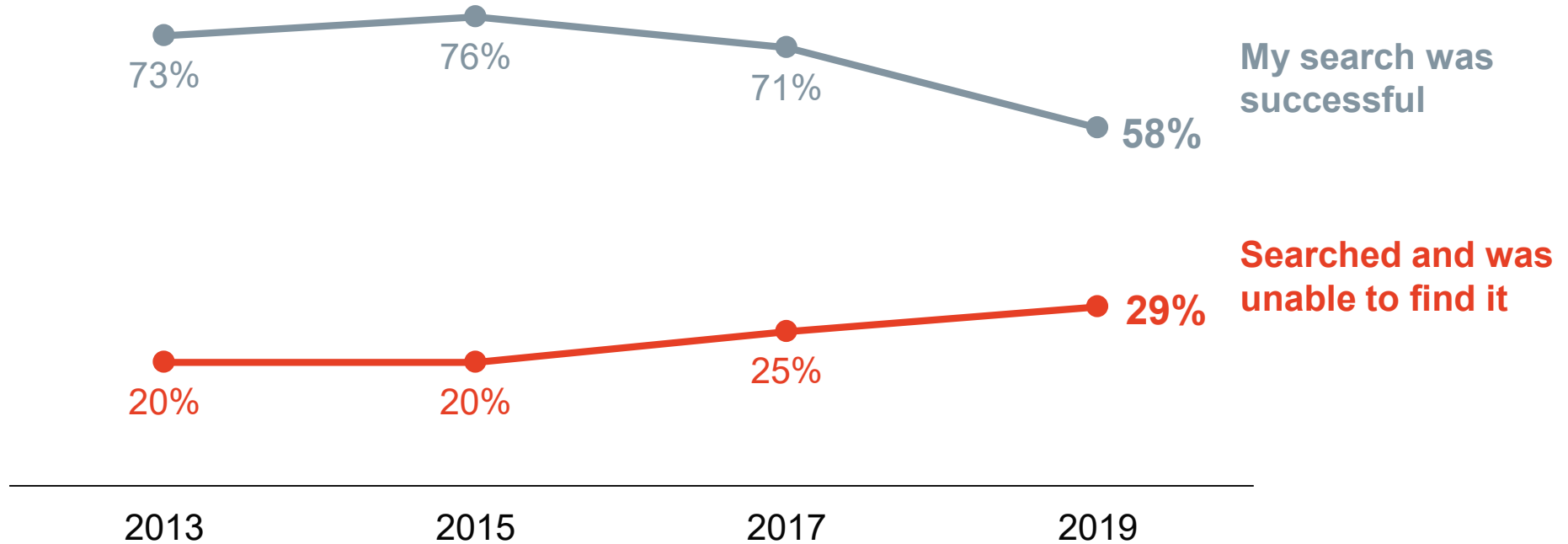# Most residents who have been to the website in the past year say it has become more useful and easier to use.

Has become more useful

64%

Has become easier to use

68%
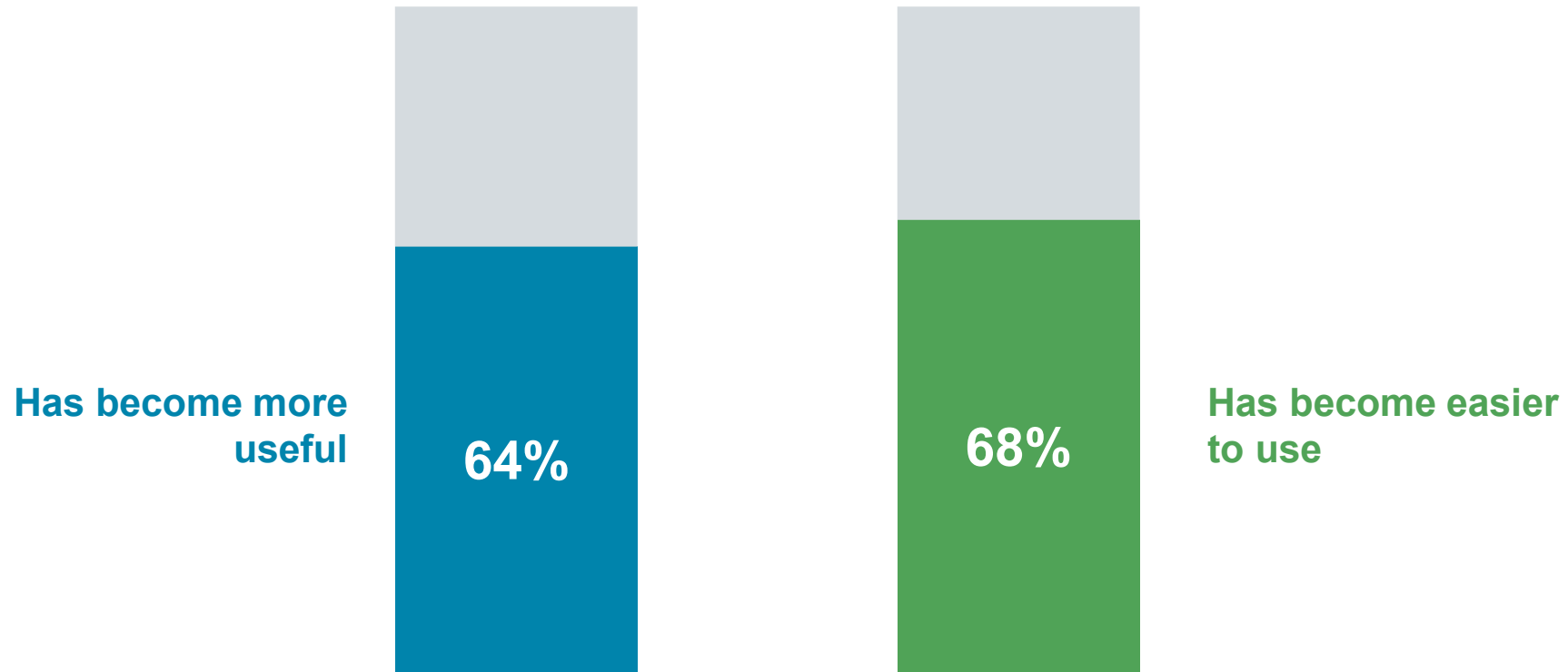
Searching for information

While most who have searched for information found what they were looking for, this number has decreased while the proportion who were unable to find information increased slightly.

73%   76%   71%   58% My search was successful

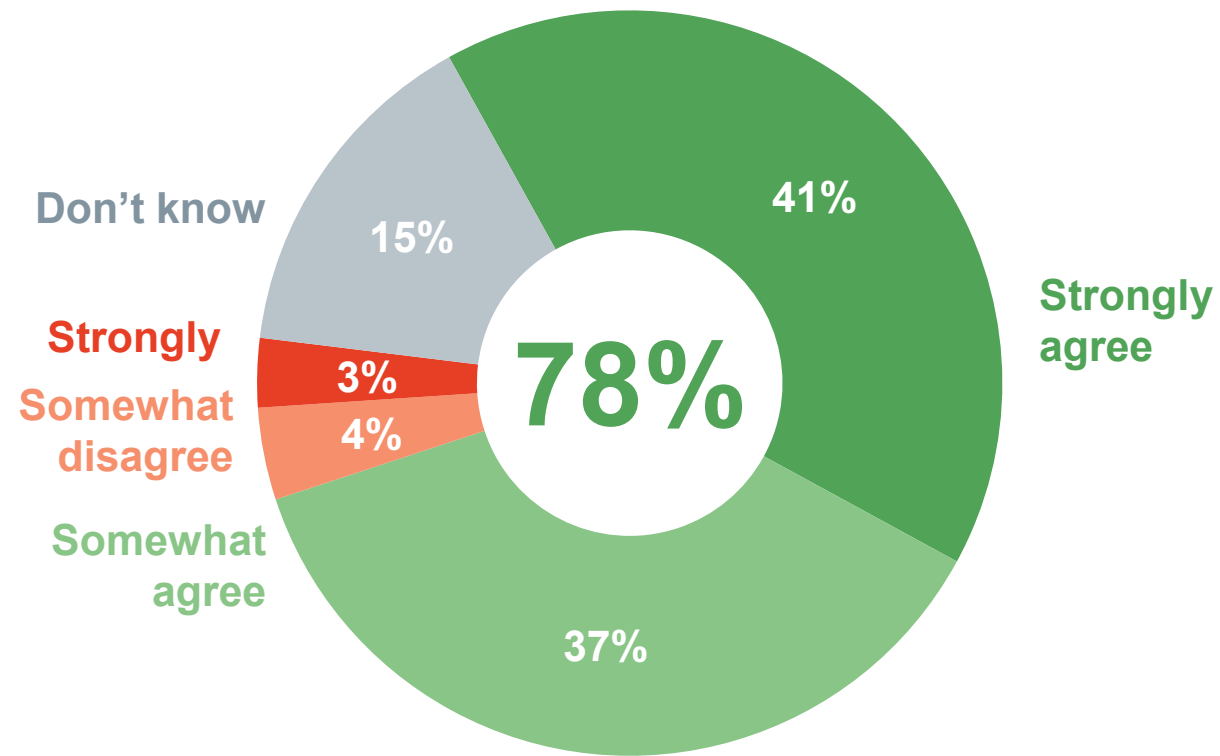20%   20%   25%   29% Searched and was unable to find it

2013   2015   2017   2019

Most agree that Oregon state government contact information is easy to find, though this number has decreased since 2013.

82%

79%

74%

72%

69%

57%

58%

56%

Somewhat easy

13%

22%

15%

16%

Very easy

2013

2015

2017

2019
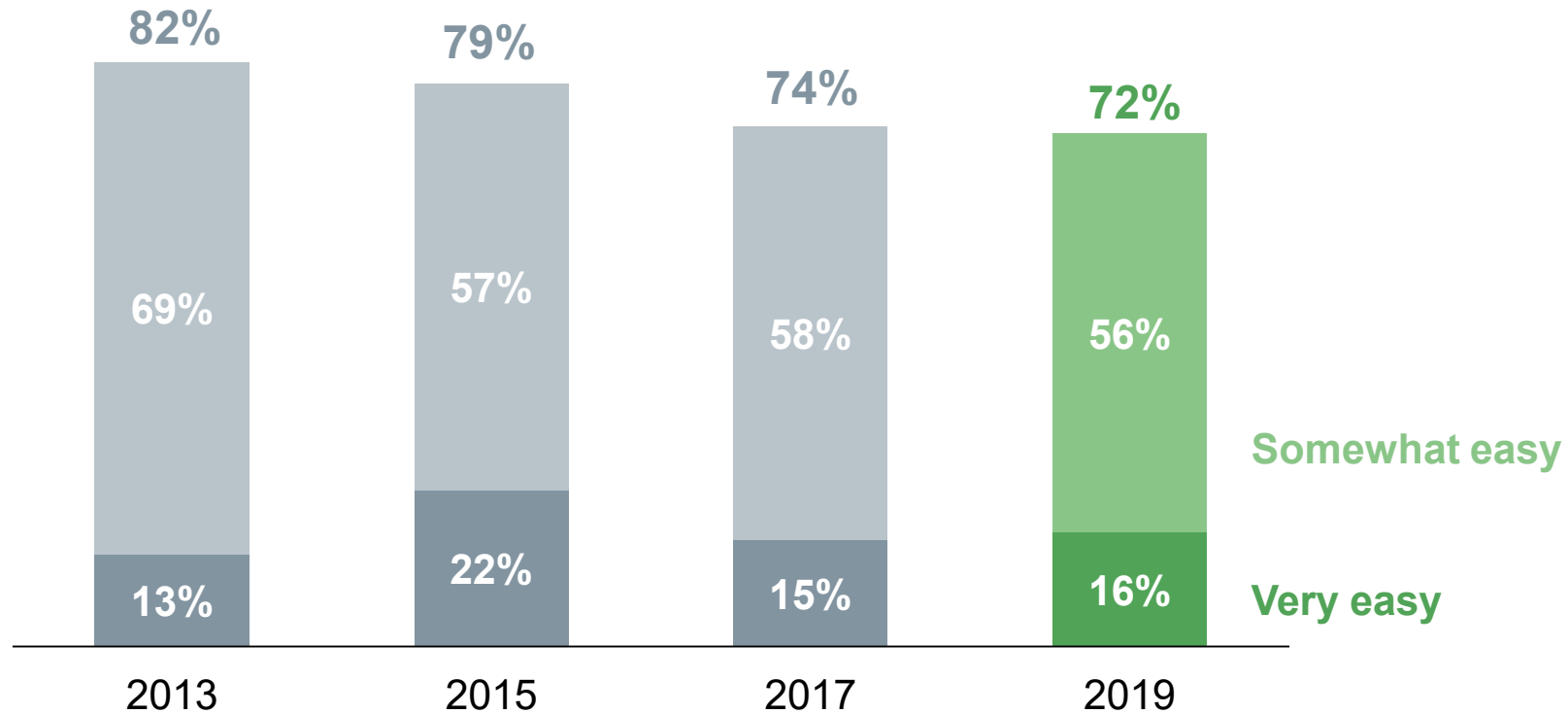
Website redesign

A strong majority agree with the way the State is redesigning its websites.

Don't know — 15%

Strongly — 3%

Somewhat disagree — 4%

Somewhat agree — 37%

Strongly agree — 41%

78%

This level of support has been consistent since 2013.

79%   80%   79%   78%

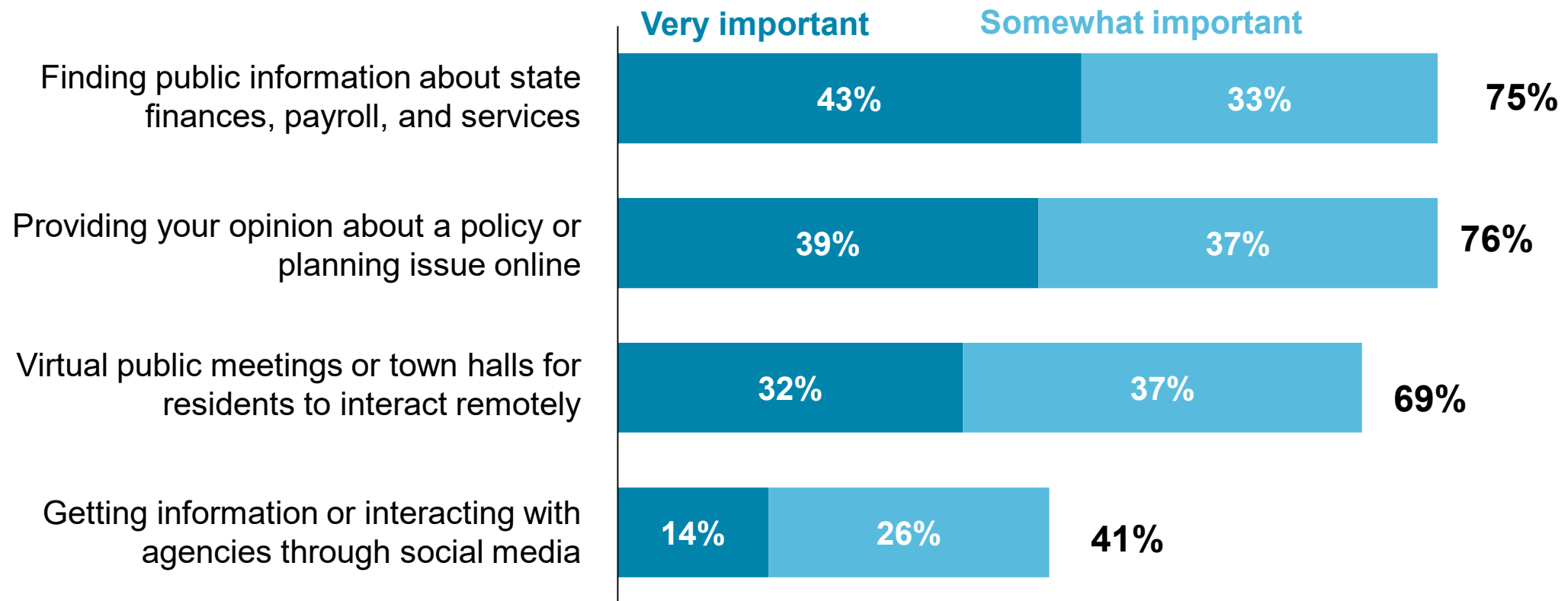|	2013	2015	2017	2019
Somewhat agree	45%	39%	40%	37%
Strongly agree	34%	42%	40%	41%
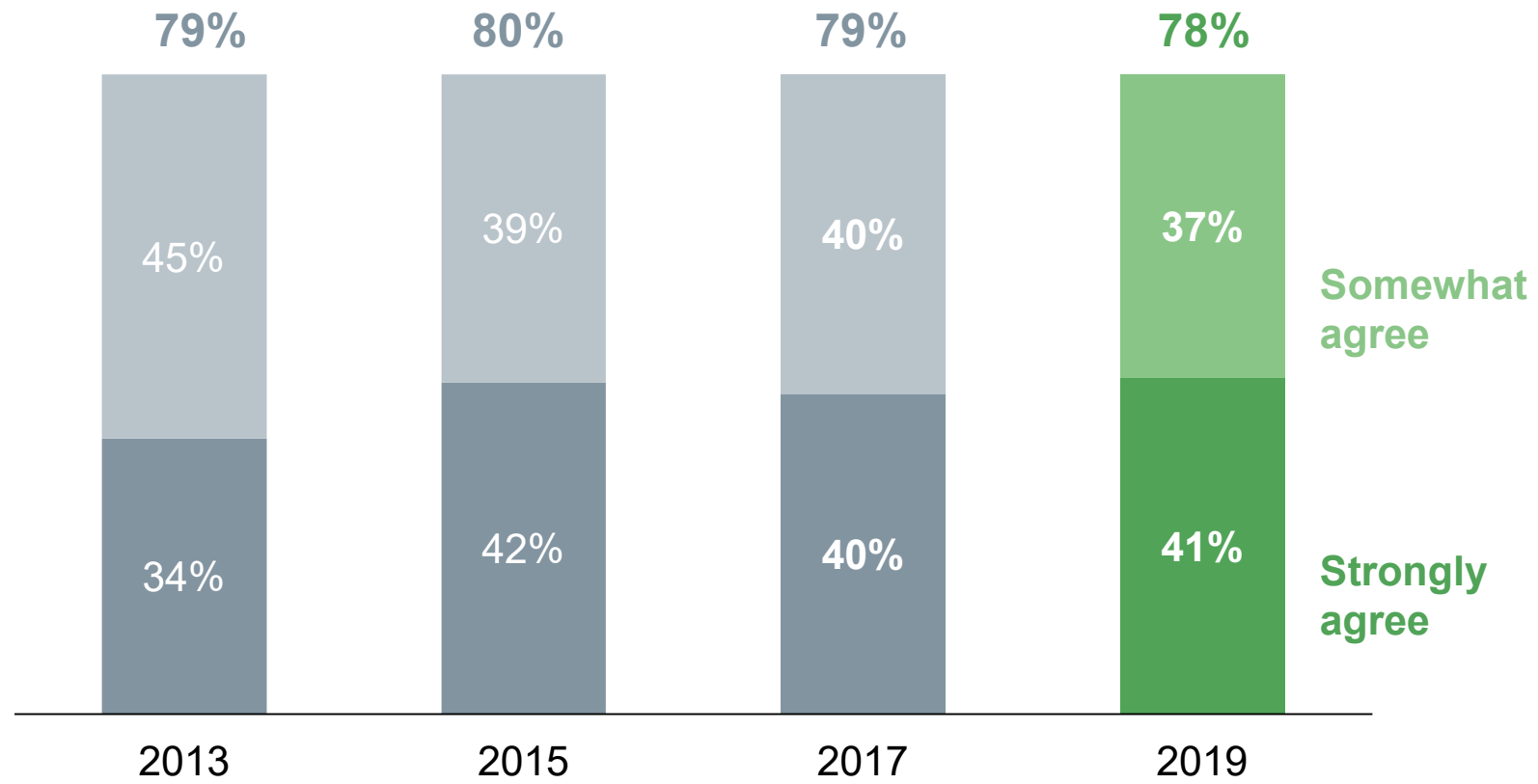
Priorities for government websites

Increasingly, Oregonians want to see state websites optimized for mobile devices.

65%

71%

75%

79%

2013
- 30%
- 35%

2015
- 27%
- 44%

2017
- 26%
- 49%

2019
- 25% — Somewhat important
- 54% — Very important

2013   2015   2017   2019
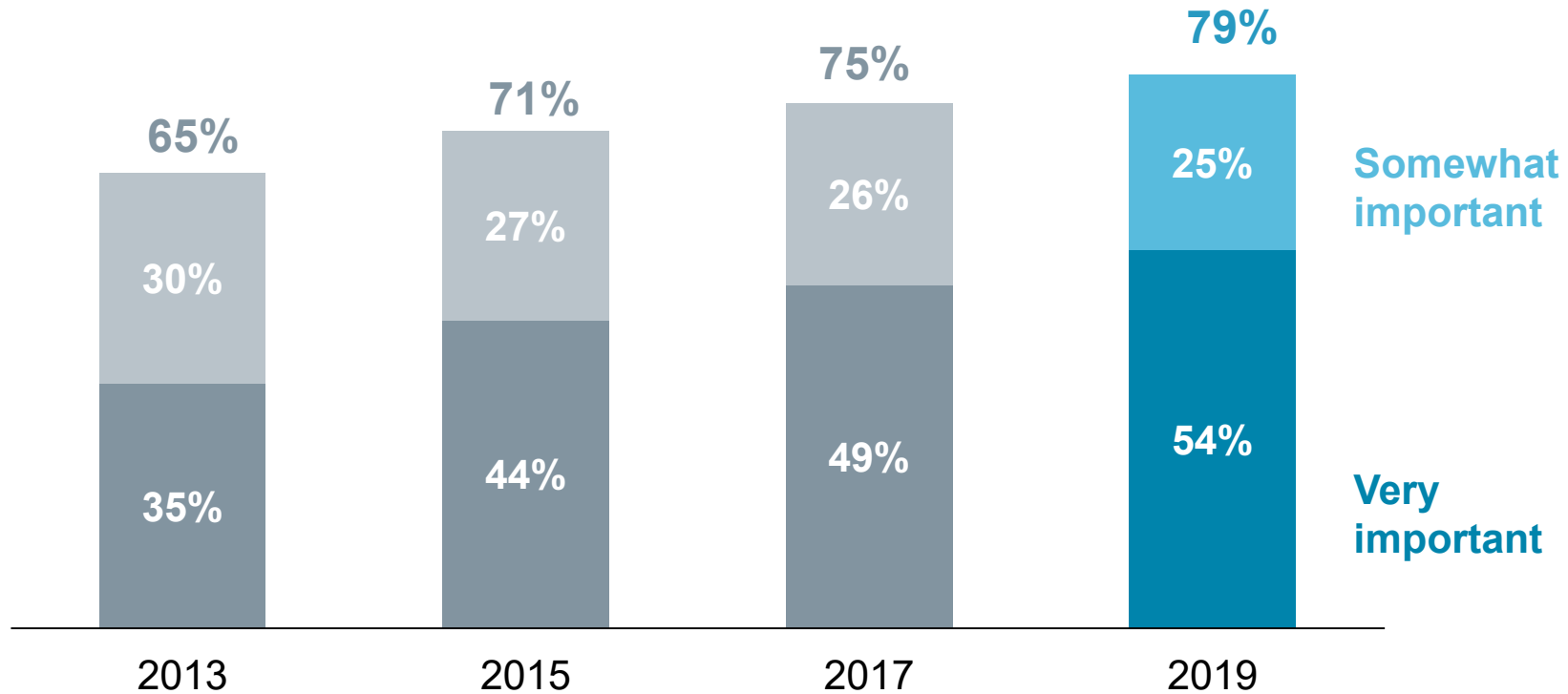
Consistent with 2017, being able to find information and provide input are top priorities. Social media is less important.

Very important **Somewhat important**

Finding public information about state finances, payroll, and services
- 43%
- 33%
- **75%**

Providing your opinion about a policy or planning issue online
- 39%
- 37%
- **76%**

Virtual public meetings or town halls for residents to interact remotely
- 32%
- 37%
- **69%**

Getting information or interacting with agencies through social media
- 14%
- 26%
- **41%**

Important of these features remains consistent.

74%
72%
79%
76% Find public information
75% Provide your opinion

69%
63%
76%
69% Virtual public meetings

42%
38%
45%
41% Social media capabilities

2013   2015   2017   2019
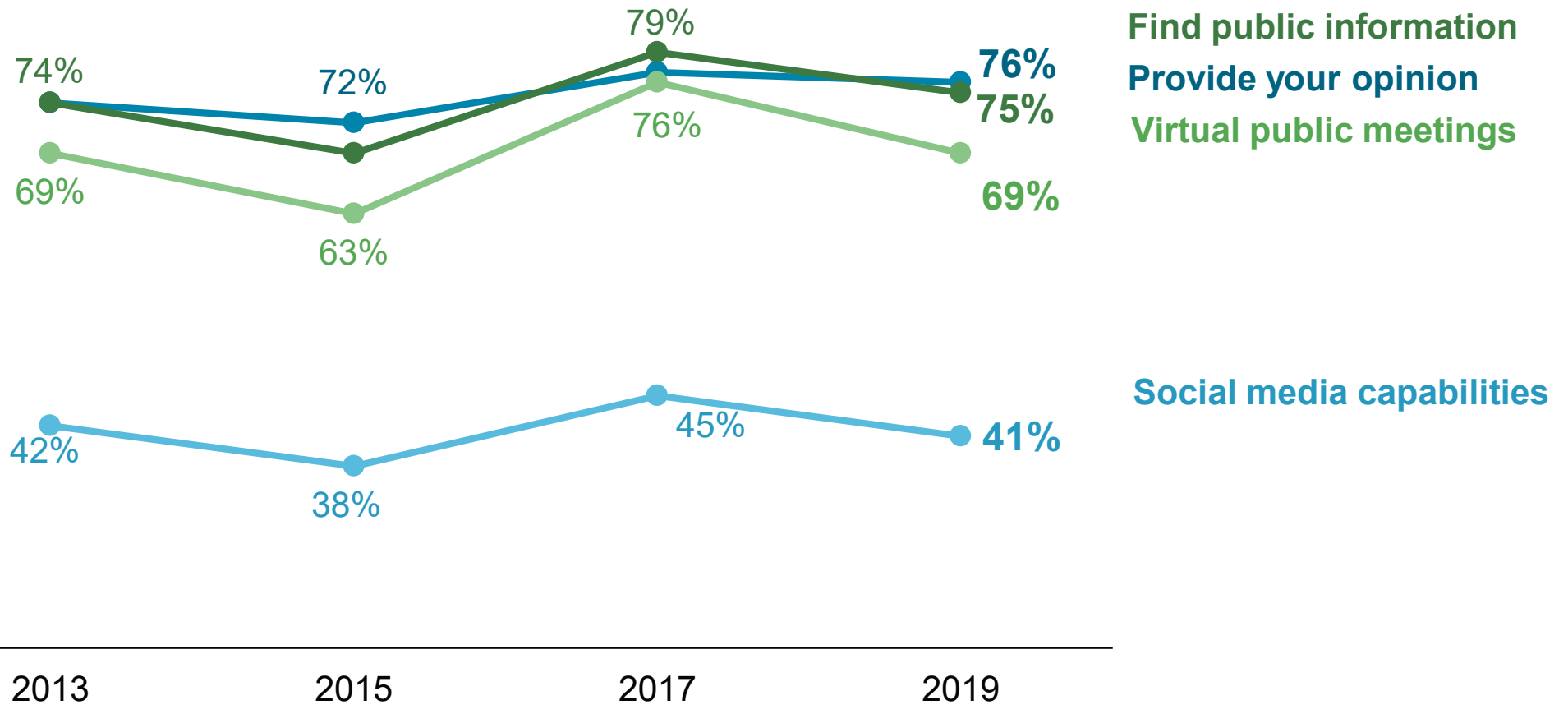
Communications

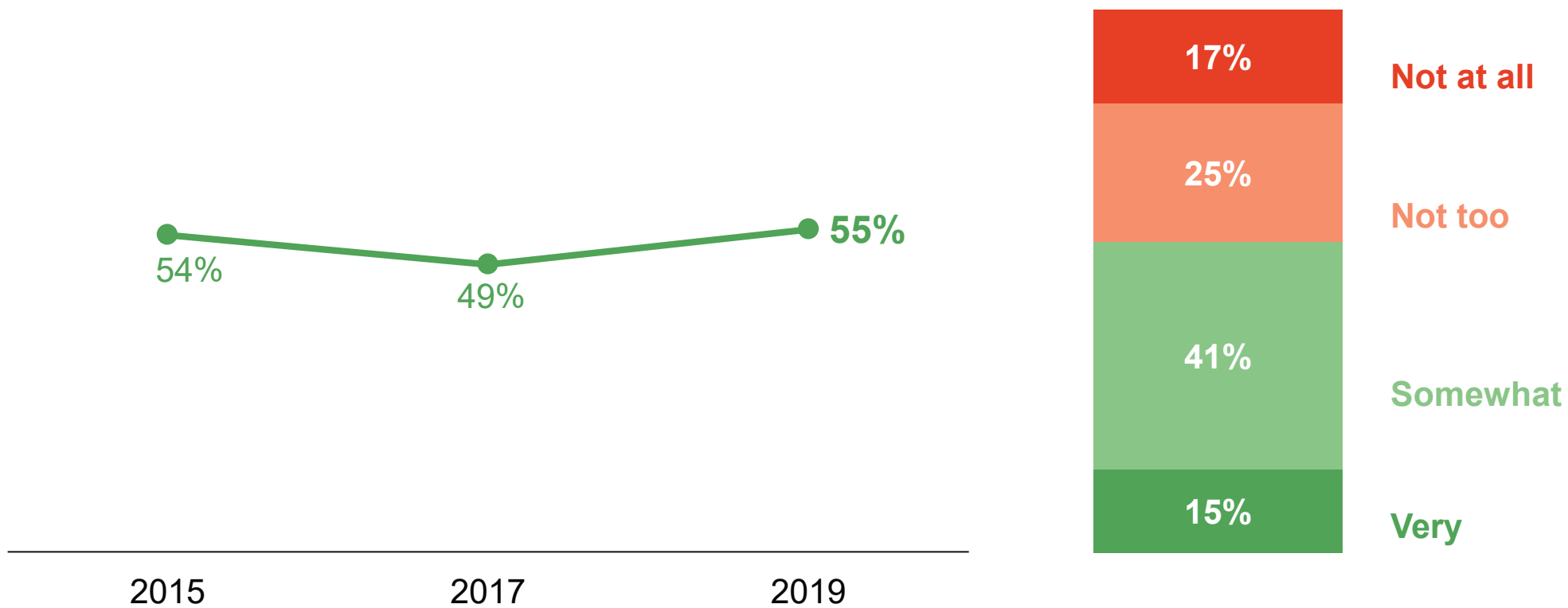# Most Oregonians say the state is doing a good job communicating about services available online.

54% 52% 56% 51%

46% 46% 46% 43% Good job

8% 6% 10% 8% Very good job

2013 2015 2017 2019
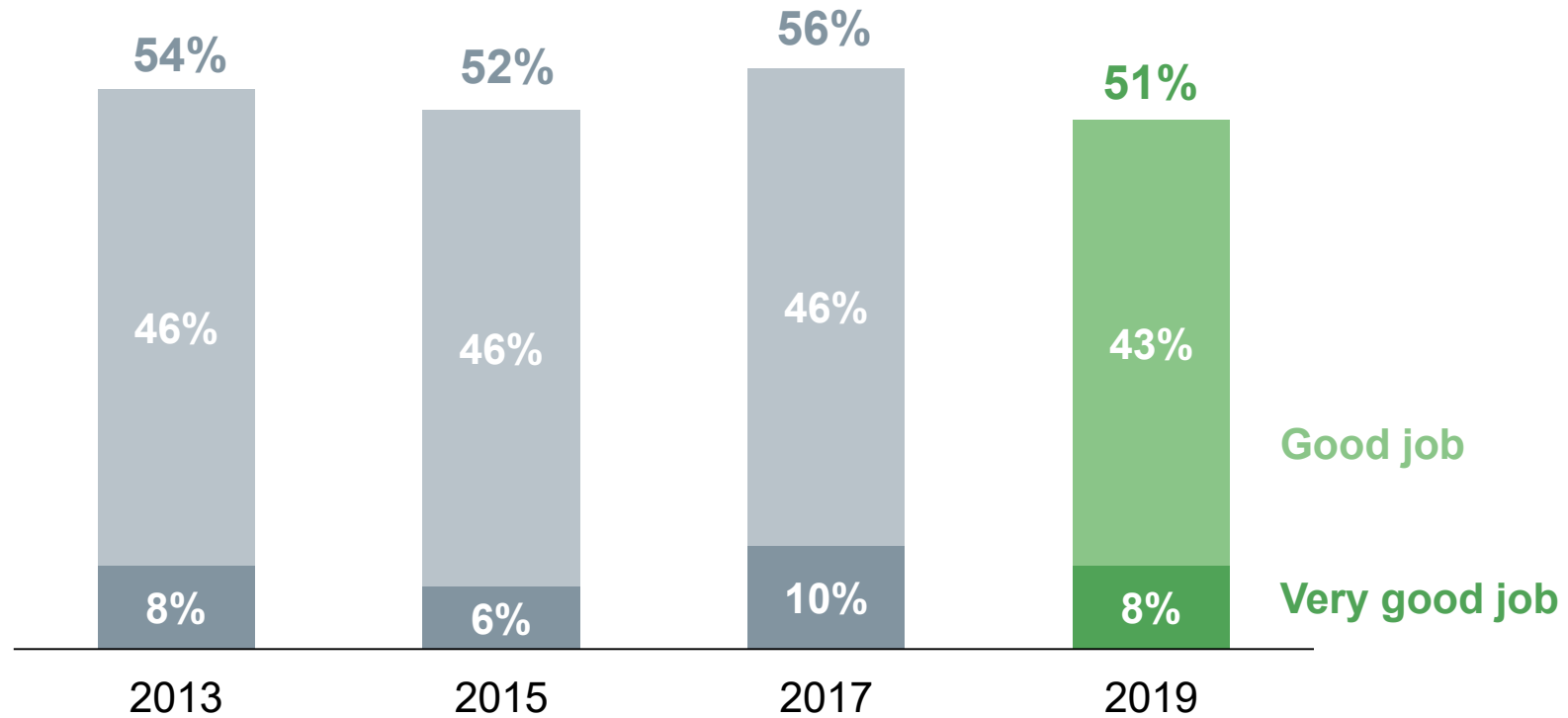
Exposure to advertisements has continued to decrease since 2013; today only two in ten have seen ads.

34%

24%

21%

19%

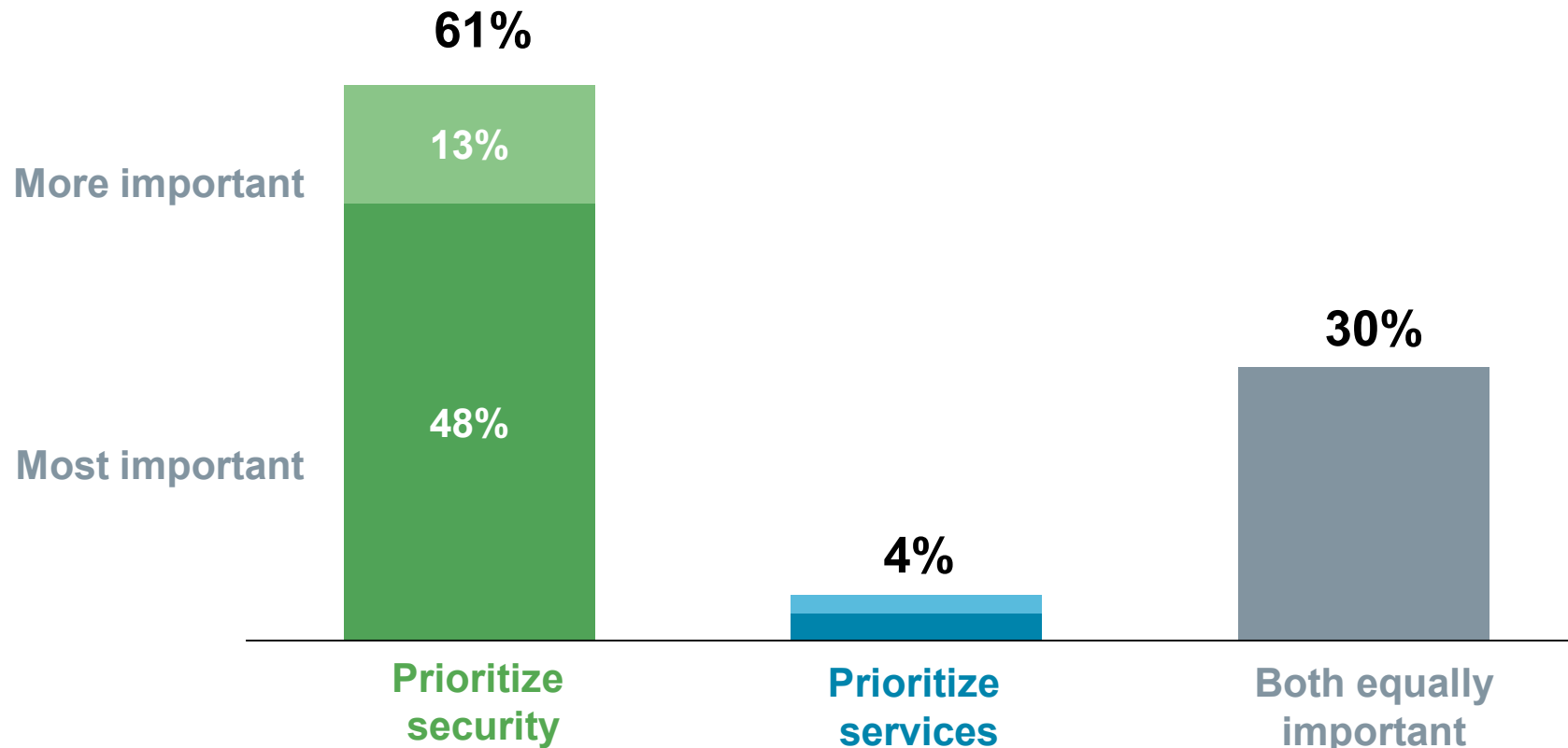2013   2015   2017   2019
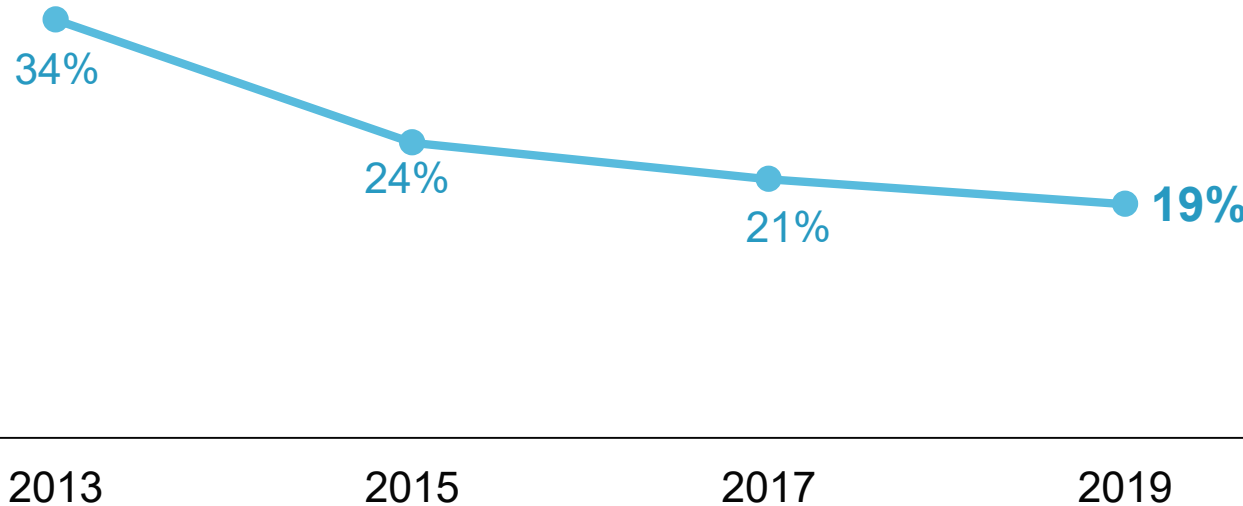
Where participants see ads:
- Television, radio (36%)
- Internet (11%)
- Social media (10%)
- Government agencies/websites (9%)
- Mail, emails (7%)
- Billboards (5%)
- Newspapers (5%)

Oregonians tend to be somewhat confident in the security of their information, and trust has increased slightly.

54%   49%   55%

2015   2017   2019

17% — Not at all
25% — Not too
41% — Somewhat
15% — Very

People overwhelmingly prioritize data security over improving services.

61%

13% — More important

48% — Most important

Prioritize security

4%

Prioritize services

30%

Both equally important

Key takeaways

Key takeaways

The internet is becoming more central to Oregonians' lives.
- Preference for finding information via website has spiked since 2017.

Oregon.gov has a wide reach.
- Nine in ten residents have heard of it. Half have visited in the last year.

Strong majorities of people who use Oregon.gov think it is both *useful* and *easy to use.*
- Over half think the site has gotten better on both of these metrics in the last year.
- However, more are having trouble searching for information they need.

Key takeaways

Being able to find information and provide input are top needs for state websites.
- Being able to interact with government on social media is less important.
- Increasingly, residents want to see the website optimized for mobile devices.

Oregonians overwhelmingly approve of the website redesign.

Information security is a priority for Oregonians.
- Between improving security and improving services, people overwhelmingly choose security.
- In the context of major hacks in the news, confidence in information security decreased from 2015.

Key takeaways

There is room to improve the State's communication about online services.

- Half of Oregonians feel the State does a good job communicating about online services, though only 19% have seen or heard the services advertised.

Certain demographic groups have less access to the internet and a harder time accessing services online, though these gaps seem to be closing over time.

- Age remains a source of significant differences in access, use, and preferences.

- Annual income and educational attainment continue to have an impact on certain items as well, though less so than in past years.

- Region or urban versus rural does not seem to have as great an impact as it has in past years.

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